

Bid Readiness Checklist

For commercial GCs & subcontractors · BidReady OS (Workflow OS) · Free resource · Version 1.0

Operational support document. Not estimating, legal or engineering advice. Every output of this process is a draft for review by qualified professionals in your company.

1 · ITB intake (same day)

- ☐ Invitation logged: source, client, due date, scope summary and delivery method.
- ☐ Full document set downloaded (drawings, specs, forms, contract draft).
- ☐ Addenda channel confirmed (plan room, portal or email list).
- ☐ Deadline on the calendar with an internal checkpoint ahead of it.
- ☐ Pre-bid meeting noted — and flagged if attendance is mandatory.

2 · Go/No-Go scorecard (score 1–5 per dimension)

- ☐ Strategic fit: does this job move the company where it wants to go?
- ☐ Scope fit: do we self-perform or control the critical trades?
- ☐ Capacity: team, supervision and bonding available in the window.
- ☐ Client & track record: payment history and relationship.
- ☐ Margin potential: realistic after escalation and market conditions.
- ☐ Competition: who else is bidding and at what likely level.
- ☐ Risk: contract terms, schedule pressure, site constraints.

Decision rule (BidReady rubric): total $\geq 75 \rightarrow$ bid · 60–74 $\rightarrow$ conditional, resolve the gaps first · $< 60 \rightarrow$ decline in writing and keep the relationship.

3 · Bid documents

- ☐ ITB read end to end, including exhibits and attachments.
- ☐ Required forms, bonds and bid security listed with amounts and format.
- ☐ Insurance and licensing requirements flagged against current certificates.
- ☐ Alternates, unit prices and allowances identified and priced separately.

4 • RFI management

- ☐ Every question logged with owner and date raised.
- ☐ RFIs sent before the stated cutoff, in the required format.
- ☐ Answers and addenda tracked to closure.
- ☐ Scope, quantities and price re-checked after every addendum.

5 • Sub & supplier quotes

- ☐ Bid invites out early enough for quality coverage.
- ☐ Quotes leveled on one comparison sheet: scope, exclusions, schedule.
- ☐ Coverage confirmed for every specified division — no silent gaps.
- ☐ Exclusions documented per sub and carried into the proposal.

6 • Estimate & proposal assembly

- ☐ Quantities verified against the latest addendum, not the original set.
- ☐ Labor, material, equipment, subs and general conditions summarized.
- ☐ Escalation and contingency applied per company policy.
- ☐ Proposal letter matches the required format exactly.
- ☐ Clarifications and exclusions written in plain language.
- ☐ Final review by a second estimator before anything goes out.

7 • Submit & follow-up

- ☐ Submitted before the deadline, with delivery confirmation saved.
- ☐ Complete bid package filed (estimate, quotes, addenda, RFIs).
- ☐ Result and client feedback logged for the win/loss record.
- ☐ Short debrief held: what to repeat, what to fix, on the next bid.

Tip: keep one printed copy per active bid in the bid room; the Go/No-Go page travels with the opportunity from intake to award.